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PURCHASING USER MANUAL

CREATING A REQUISITION

INTRODUCTION

Any user with access to the Purchasing application can create a requisition.

- Any requester can create a requisition from the **Requisitions** menu, **Requisitions** tab.

Figure 1 - Requisitions menu to Requisition tab

The screenshot shows the Purchasing application interface. On the left, there is a navigation menu with three items: 'Requisitions' (highlighted with a red circle and a red arrow pointing to the 'Requisition' tab), 'Purchase Orders', and 'Receiving'. The main area displays the 'Requisition' tab. At the top of this tab, there are four sub-tabs: 'Status', 'Requisition' (active), 'Approval', and 'Reports'. Below the sub-tabs, there is a form for creating a requisition. The form includes fields for 'Department' (a dropdown menu with '~Select Department~'), 'Req #' (a dropdown menu), 'Tracking #' (a dropdown menu), 'BFY' (a dropdown menu with '2008'), 'Need by' (a date field with '01/14/2008'), 'All or Nothing' (a checkbox), 'Req Atch' (a checkbox), and 'Description' (a text area). There are also buttons for 'New Requisition', 'Save', 'Make', and 'Make Te'. The status is set to 'New Requisition'.

- Any Purchaser can create a requisition from the **Purchase Orders** menu, **Requisitions** tab. In addition, a Purchaser can create a requisition on behalf of another person. NOTE: A Purchaser's requisition must be approved through the **Requisitions** menu, **Approval** tab or authorized, if required by the agency's process, on the **Requisitions** menu, **Requisition** screen).

Figure 2 - Purchase Orders to Requisition tab

The screenshot shows the Purchasing application interface. On the left, there is a navigation menu with three items: 'Requisitions', 'Purchase Orders' (highlighted with a red circle and a red arrow pointing to the 'Requisition' tab), and 'Receiving'. The main area displays the 'Requisition' tab. At the top of this tab, there are four sub-tabs: 'PO Status', 'Req Status', 'Requisition' (active), 'Assign', 'PO', and 'Report'. Below the sub-tabs, there is a form for creating a requisition. The form includes fields for 'Acct System' (a dropdown menu with 'WRK: Worker Dept'), 'Req #' (a dropdown menu), 'Tracking #' (a dropdown menu), 'Need by' (a date field with '11/13/2008'), 'All or Nothing' (a checkbox), 'Req Atch' (a checkbox), and 'Desc' (a text area). There are also buttons for 'New Requisition', 'Save', 'Make', and 'Make Te'. The status is set to 'New Requisition'. The 'Created for' field is set to 'ROCHENDA REYNOLDS'.

TO CREATE AND SAVE A REQUISITION

There are no required fields to initially save a requisition. Your agency may require certain fields for you to complete.

1. Click the **Requisition** tab.
2. If your agency has created requisition departments, select a **Department**.
 - If you belong to only one department, it will be displayed by default.
 - If your agency has not created requisition departments, there will be no **Department** menu and one is not required.

Figure 3 - Requisition Department

The screenshot shows the 'Requisition' tab selected in a software interface. The 'Department' dropdown menu is open, showing options: '~Select Department~', '~Select Department~', 'RAD: Research and Development', and 'WRK: Worker Dept'. The 'Req #' field is empty. The 'Tracking #' field is empty. The 'All or Nothing' checkbox is unchecked. The 'Req Atch' icon is visible. The 'Status' is 'New Requisition'. The 'Requested by' and 'Edited by' fields are empty. Buttons for 'New Requisition', 'Save', 'Print Preview', and 'Make Template' are present.

3. Enter a requisition number in the **Req #** field. If the Requisition Department automatically assigns a requisition number, this field will not be displayed.
4. If desired, enter a **Need by** date or select a date using the calendar icon. This will indicate to the purchaser that you want to have your request fulfilled by that date.
5. Check the **All or Nothing** check box, if desired. This will indicate to the purchaser that you require all of the items in your requisition, and if they cannot be purchased together, then the items should not be purchased.

Figure 4 - New requisition

The screenshot shows the 'Requisition' tab selected in a software interface. The 'Department' dropdown menu is set to 'RAD: Research and Development'. The 'Req #' field contains the value '08-45566'. The 'Tracking #' field is empty. The 'Need by' date is '11/13/2008'. The 'All or Nothing' checkbox is unchecked. The 'Req Atch' icon is visible. The 'Desc' field contains the value 'Building tools'. The 'Status' is 'New Requisition'. The 'Requested by' and 'Edited by' fields are empty. Buttons for 'New Requisition', 'Save', 'Print Preview', and 'Make Template' are present.

6. If desired, click the **Req Atch** icon to attach scanned documents applicable to the requisition in general. You can add attachments at any time in the process. NOTE: You can also attach documents to individual line items using the **Atch** icon. See Attaching Scanned Documents.
7. Type a description in the **Description** field.
8. Click **Save**. A tracking number (**Tracking #**) is automatically assigned so that the document can be tracked in the application. If the Requisition Department is manually entered, it won't be saved yet. If the requisition number is automatically assigned, it will not be assigned yet.

Figure 5 - Requisition ready for line items

The screenshot shows the 'Requisition' tab of a software interface. The 'Tracking #' field is circled in red. The form includes the following fields and buttons:

- Department: RAD: Research and Development
- Req #: 08-45566
- Tracking #: 538 (circled in red)
- Need by: 11/13/2008
- Desc: Building tools
- Status: New Requisition
- Requested by: JAMES CARTER (11/06/2008)
- Edited by: JAMES CARTER (11/06/2008)
- Buttons: New Requisition, Save, Print Preview, Add Item, Make Template, Delete Requisition
- Message: Changes Saved
- Total: \$0.00
- Options: Vendor Info, Coding Info, Receiving Info
- Footer: Notes Atch Item #, Description Qty, U/M*, Price, SubTotal WorkFlow, VendorNo

- The **Req Notes** icon becomes available after you click **Save**. Click the icon to add comments in general or notes for the purchaser, or whatever is applicable to the requisition. You can add notes at any time. NOTE: You can also add notes to individual line items using the **Notes** icon next to a line item.
- Click **Delete Requisition** if you decide to delete the requisition after you have saved it.

TO ADD LINE ITEMS TO THE REQUISITION

Once the requisition is saved, you can begin adding items.

- Click **Add Item**. A grid will be displayed for you to enter line item details.

Figure 6 - Add Item

The screenshot shows the 'Add Item' grid in the 'Requisition' tab. The 'Add Item' button is circled in red. The grid has the following columns:

- Notes
- Atch
- Status
- Item #
- Description
- Qty
- U/M
- Price
- SubTotal
- WorkFlow

The 'Add Item' button is highlighted with a red circle. The 'Itemize Complete' button is also visible. The 'Total' is \$0.00. The 'Vendor Info', 'Coding Info', and 'Receiving Info' options are present. The footer includes a menu icon and a 'Press F3 for Lookup' note.

- Enter an **Item #**, if needed.
- Enter or edit a description in each **Description** field as needed.
- Enter a quantity in the **Qty** field.
- Select a unit of measure from the **U.M.** menu, e.g., Each, Box, Dozen, etc. (Select **More...** in the menu to select from all of the available units of measure.)

6. Enter the price for a single unit of measure in the **Price** field. The **SubTotal** field will automatically calculate the **Price** multiplied by the quantity (**Qty**).
7. If known, select a workflow from the **Workflow** menu. (A Workflow is not required until fiscal coding is completed.)
8. Continue to click **Add Item** to add as many items needed for your requisition. The total amount of the requisition will be displayed.

Figure 7 - Total amount

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Workflow
Menu			15222	Hammer	3	Each	30.00	90.00	Accounting
Menu			451222	#12 Nails	2	Box	15.00	30.00	Accounting

9. If you want to save the requisition and line items so that you can finish it later, click **Save**.
10. To delete a line item or duplicate a line, click **Menu** next to that line item. NOTE: All line item menu options will be available after you click **Save** (see the [Requisition Line Item Menu](#) section below).
11. If needed for your agency's process, check the **Vendor Info** check box and enter a vendor name and address.
 - Enter just a vendor name and the application will save it. The purchaser can then use this to look up the actual vendor number.
 - Enter a valid vendor number and suffix and press TAB, the application will automatically enter the vendor name and address.
 - Enter an invalid vendor number/suffix, but you must then also enter a vendor name.

The purchaser may add or update the vendor information with the actual vendor number and vendor name when a purchase order is created.

Figure 8 - Vendor info

Notes	Atch	Status	Item #	Description	VendorNo	Sfx	Vendor Name	Business	Address	City
Menu		Awaiting Fiscal Coding	15222	Hammer			Ace hardware			
Menu		Awaiting Fiscal Coding	451222	#12 Nails	2544122333	01				

12. If you are finished adding items to the requisition, click **Itemize Complete**.
13. If your agency has created requisition departments, and you have not yet selected a **Department**, you will be prompted to do so.
14. The requisition will be "Awaiting Authorization" or "Awaiting Fiscal Coding", depending on how your Purchasing administrator has set up your agency.
15. If you are a "Coder" in the application, continue with [entering fiscal coding on the requisition](#).

REQUISITION LINE ITEM MENU

After saving a requisition with line items added, you can use the line item **Menu** for a variety of functions. (Prior to saving, you can only delete or duplicate a line or show the history or the full description.)

The menu functions include:

- Click **Delete Line Item** to delete the line item.
- Click **Duplicate Line Item** to create another row that is a duplicate of that line.
- Click **Create Freight Item** to create another row to enter freight charges separately. This line will be associated to the line item selected. The purchaser will not have to select this row to add to a purchase order – it will be part of the requisition line item.
- Click **Show History** to view the actions taken on the requisition.
- Click **Show Full Description** to see the complete text of the **Description** field. You can also double-click the **Description** field to show the complete description.
- Click **Request Price Check** to send an alert to a purchaser to verify the cost of that line item.
- Click **Edit Ship-To Address** to select a specific shipping address from a list that is maintained by your agency's Purchasing administrator. Only required if you do not want to use the default address or if no default address is present.
- Click **Edit Bill-To Address** to select a specific billing address from a list that is maintained by your agency's Purchasing administrator. Only required if you do not want to use the default address or if no default address is present.

TO FIND THE PURCHASE ORDER NUMBER OR STATUS FOR A REQUISITION

Once a requisition has been ordered, you can check the status of the items, the purchase order number, the name of the purchaser, and if any of the items have been received.

1. From the **Requisitions** menu, click the **Status** tab.
2. Click **Select** next to a requisition with a status of **Ordered**.
3. Check the **Receipt info** check box.

Figure 9 - Requisition receipt info

Department: RAD: Research and Development, Req #: 6546-5, Tracking #: 298

Buttons: New Requisition, Save, Print Preview

Need by: 04/25/2008, All or Nothing: ☐, Req Notes: ☐, Req Atch: ☐

Desc: Binoculars

Status: Ordered

Requested by: JAMES CARTER (04/18/2008), Edited by: JAMES CARTER (04/18/2008)

Buttons: Make Template, Void Requisition

Buttons: Add Item, Clear All Items

Total: \$445.00

Checkboxes: ☐ Vendor Info, ☐ Coding Info, ☒ Receiving Info (circled in red), *Press F3 for Lookup

Notes	Atch	Status	Item #	Description	Purchaser	PO #	Receiver Rct Date
Menu	<input type="checkbox"/>	Ordered	333-ABC	Binoculars	PAMELA MENJIVAR	6235-Sx	
Menu	<input type="checkbox"/>	Ordered	8456AMC	Binoculars	PAMELA MENJIVAR	6235-Sx	

The requisition items, the purchase order number, the name of the purchaser, etc. will be displayed